

How to Use This Workbook

Column	Explanation
Readiness Consideration	These are the list of items to discuss to help you prepare. They are divided by topic. We recommend that you complete this workbook with agency leaders responsible for work related to Medicaid transformation.
Status	<p>Use this column to indicate your current readiness for each consideration.</p> <p>GREEN: We are ready. We have addressed this action, or it does not apply to us.</p> <p>YELLOW: There are some potential issues, but we have a plan to address them. We are headed in the right direction.</p> <p>RED: This is an area of concern. We do not have a resolution yet for this issue and do not feel prepared. Discuss with your OST representative.</p>
Comments	Add notes here for your discussion with your OST rep. You can also use this column to note updates as you make progress in preparing for transformation.
Action Items	List the actions you need to take to resolve issues you have identified.
Issue Owner	Enter the name of the person in your agency who is responsible for completing the Action Item. Leave blank if there are no issues.
Target Date	Determine a date as to when the issue should be resolved.
*We have included a "Caseworker Checklist" as well to share with direct line staff.	
NOTE: Your OST representative will schedule a call with you to discuss any questions or concerns you have identified when reviewing these considerations.	



NC DEPARTMENT OF
HEALTH AND HUMAN SERVICES
Division of Health Benefits

NC Medicaid Transformation Readiness Considerations

County:
Date Conducted:
OST Representative:
Prepared By:
Meeting Participants:

Readiness Consideration		Status	Comments	Action Items	Issue Owner (if applicable)	Target Due Date
Site Preparation						
Outreach Materials Enrollment Events Office Space	Do you have a plan for posting (or otherwise make available) outreach materials? (e.g. posters, flyers, palm cards, Q&A, beneficiary Fact Sheet) Electronic versions of outreach materials are posted here: https://medicaid.ncdhhs.gov/county-playbook-medicaid-managed-care . The Enrollment Broker will provide hard copies of these materials to your agency.					
	How will your staff be made aware of enrollment events and the Enrollment Broker onsite support schedule for your county? (Note: the Enrollment Broker will be advertising enrollment events for beneficiaries and the schedule will be posted on NCMedicaidplans.gov, "Meetings and Events")					
	If you have opted-in for onsite support from the Enrollment Broker, have you ensured the space will be available and the support specifications met?					
	Do you have designated areas in your agency that beneficiaries may use to call the Enrollment Broker? (e.g. private areas with phones) What about to go online for visits to the NC Medicaid plans website? (e.g. computer kiosks)					
Staffing						
Staffing	If you have satellite locations: Do you plan to prepare staff in satellite locations to help field questions related to Medicaid Transformation? Will you have outreach materials available at those offices?					
	Are you prepared to support additional foot traffic in your agency? (Please reference: https://files.nc.gov/ncdma/FactSheet3-Increase-Beneficiary-Contact-20190521.pdf ; https://files.nc.gov/ncdma/Instructional-Guide-for-Managed-Care-Status-Estimates-by-County-Report.pdf)					
	If you have vacant Medicaid, reception, and/or triage positions, do you have a plan to fill those vacancies?					
	Have you thought of ways to use administrative support staff to triage beneficiary and member questions before seeing a Caseworker? This could include handing out palm cards, flyers, contact sheet. Please reference outreach materials posted here: https://medicaid.ncdhhs.gov/county-playbook-medicaid-managed-care					
	Have you reviewed the Managed Care Status Estimates by County report (NC FAST Help > Managed Care Changes) for your county and determined how you can support increased phone calls and visits? Have you determined if you will need temp staff or if comp time can be used for handling additional foot traffic during this transition period?					
	Do you have staff that have concerns about Medicaid Transformation? How will you support them so they can best help beneficiaries?					
	Consider how your staff handles change. How effective are your supervisors in managing change, addressing worker challenges, and in motivating staff? Do you have a plan to support staff that may find change difficult?					
Communications						
Staff Communications	Are all staff subscribed to the Medicaid listserv (Terminal messages) in order to receive important updates related to NC Medicaid Managed Care? If not, you can subscribe them here: https://www2.ncdhhs.gov/info/olm/manuals/dma/eis/man/EIS1201.htm#P19_457					
	Do you have a plan to share with staff important NC Medicaid Managed Care updates?					
	Have you shared the NC Medicaid County Playbook with your staff? It can be found under the Counties tab on the DHB site: https://medicaid.ncdhhs.gov/county-playbook-medicaid-managed-care Have you used the Playbook to facilitate internal discussions in your agency?					
Medicaid Transformation Partners	Have you shared the NC Medicaid County Playbook with your county partners? It can be found under the Counties tab on the DHB site: https://medicaid.ncdhhs.gov/county-playbook-medicaid-managed-care					
	Are you actively engaged with the Medicaid Transformation Advisory Committee? Do you have a designated person in your agency responsible for escalating issues to the committee?					
	Have you been working with the Enrollment Broker to coordinate training and outreach events? Do you have a designated person in your agency to do this?					
	Have you been working with the health plans that will serve your region? Have you identified the person in your agency who will serve as the primary point of contact to work with them?					
Training						
DSS Staff	Have your staff participated in DSS Training for Medicaid Managed Care? If not, have you identified who and how many staff need to be trained? Have you considered including staff members outside of Medicaid, such as reception workers? How will you provide staff with the time necessary to complete training?					
	Do you have a plan to train staff who are not able to attend the in-person training? (Note: a recording of DSS Training for Medicaid Managed Care will be posted on the Learning Gateway at ncfasttraining.nc.gov)					
	Do you have a plan to train new hires/rehires in the agency on Medicaid Managed Care material?					
	Have all impacted staff taken NC FAST training related to Managed Care changes? Do they know how to identify a person's Managed Care Status in NC FAST? (ncfasttraining.nc.gov)					
	Will your county be conducting any in-house training on county-specific process changes?					
Increased Mail						
Mail	Have you updated beneficiary addresses based on the response to the address verifications letters? (Reports located on NC FAST Help: Economic Services > MA > Returned Mail)					
	Have you informed your beneficiaries who have the local DSS listed as their home address that they may be receiving an increased amount of mail in the coming months due to NC Medicaid Managed Care? Do you have a plan for storing this additional mail?					
Warm Transfers						



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Technology	Do all of your Medicaid Staff have phones? Do your phones have the capacity to transfer calls? And is the person able to remain on the line with the customer to complete a true warm transfer? (Please reference: https://files.nc.gov/ncdma/FactSheet5-Warm-Transfers-Referrals-20190521.pdf for recommendations on warm transfers)					
	Have you considered changing your county Interactive Voice Response (IVR) to provide the Enrollment Broker contact information for questions about Medicaid Transformation?					
Process	Do you have a set process for handling warm transfers and referrals? Are staff aware of expectations for how these referrals will be handled?					
	If your county cannot support warm transfers, do you have a plan for assisting beneficiaries who may need extra help (e.g., those that are not able to use the website to get information)?					
	Does your direct line staff know to direct beneficiaries to the Enrollment Broker for help choosing a health plan? Are they aware this choice counseling is not their responsibility?					
	Do you have a plan for how to handle additional calls that may come in to your agency due to incoming warm transfers from the Enrollment Broker or health plans?					
Call Center	Do you have a call center or client help line? Have these staff attended training or otherwise been informed about NC Medicaid Managed Care?					
Enrollment Broker						
General	Is your staff informed on the role of the Enrollment Broker and how to work with them?					
	Does your staff know who to contact for different types of questions?					
Considerations for when enrollment packets begin to be sent to beneficiaries						
Considerations	Is your staff aware of when beneficiaries will begin receiving enrollment packets - June 28 (regions 2 and 4) and October 1 (regions 1, 3, 5, 6)? The notice list and descriptions can be found here: https://files.nc.gov/ncdma/NCMedicaid-FactSheet-Managed-Care-Populations-and-Enrollment-Notices.pdf					
	Have you analyzed the number of beneficiaries in your county who will remain in NC Medicaid Direct or will move to NC Managed Care? Have you considered how those numbers will impact your county? The report for the estimated number of beneficiaries by enrollment status is posted on FAST Help under "Managed Care Changes."					
Non-Emergency Medical Transportation - NEMT						
General	Have you been in contact with the health plans' NEMT vendors? For contact information, please see https://files.nc.gov/ncdma/FactSheet4-NEMT-20190521.pdf					
	Do you have contracts with any health plans? If so, are you aware of each health plan's NEMT process and policy?					
	Have you determined if any of your NEMT staff will need to shift to new roles and responsibilities once the health plans take over this responsibility for their members (Nov 1, 2019 - Phase 1; Feb 1, 2020 - Phase 2)? Please note: each county DSS will still be responsible for NEMT for NC Medicaid Direct.					
	What are your agency's concerns related to how NEMT is changing? What steps can you take to address these concerns?	N/A				
Additional Consideration						
	What do you need to know more about to be prepared for Medicaid Transformation? Please share these details with your OST representative and the DSS Medicaid Advisory Committee.	N/A				

Caseworker Checklist	
Suggest Completing before Open Enrollment begins	
	Completed NC FAST Training
	Completed DSS Training for NC Medicaid Managed Care
	Reviewed the NC Medicaid County Playbook - including the different notices that beneficiaries may receive from the Enrollment Broker (See: https://files.nc.gov/ncdma/NCMedicaid-FactSheet-Managed-Care-Populations-and-Enrollment-Notices.pdf)
	Understand the Medicaid Transformation Timelines (See: https://files.nc.gov/ncdma/FactSheet2-Intro-Medicaid-Transformation-Part2-20190521.pdf)
	Can identify the Managed Care Status in NC FAST
	Understand when and how to direct a beneficiary to the Enrollment Broker for assistance
	Have access to Enrollment Broker outreach material to provide to beneficiaries when they have questions
	Understand county's internal escalation process for Medicaid Transformation issues
	Know when Enrollment Broker representative will be onsite (if applicable)
	Know when enrollment events and outreach events will be occurring in your community